Chapter 14

Maintain A COI/VIP Record

14-1. General.

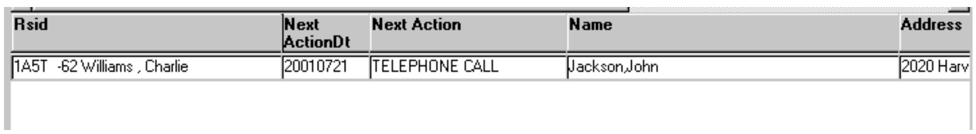
a. Since you already created your COI and VIP records and scheduled future actions, you need to continue the rapport you have established. You will need to enter information about followup calls on their COI or VIP record.

b. The following steps will show you how to maintain a COI or VIP record:

(1) Locate scheduled appointments.

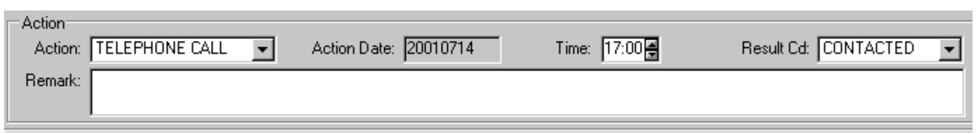
(2) Record today's action.

14-2. Locate scheduled appointments. To accomplish this you first need to understand that the **Find** screen will show those dates and times that you have scheduled to contact your COIs and VIPs. When you opened your **Find** screen this morning you noticed that you scheduled a telephone call with Mr. Jackson. Notice the bottom half of the **Find** screen is an area listing **Next Action** to be taken. This is the activity area of the **Find** screen. In this case, you completed the telephone call to Mr. Jackson. So you would select that line on the **Find** screen. Now, to go to the **COI/VIP** screen relating to the selected line, click the **OK** button. This will bring up the **COI/VIP** screen for Mr. Jackson.



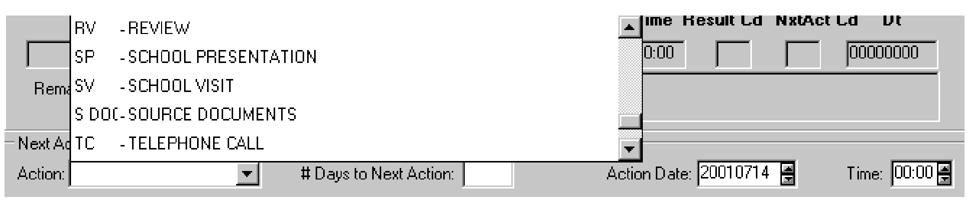
14-3. Record today's action.

a. You'll need to enter information in the **Action** area about your followup telephone call. Notice that **TELEPHONE CALL** already appears in the **Action** window. That window automatically populates with what was entered as the **Next Action** the last time this screen was accessed. The current date and time also appear in the **Action** area. The date cannot be changed. However, you should change the time to when you actually made the telephone call. Now, you need to enter the **Result Cd** of your telephone call. To access the list of results, click on the drop-down arrow for the **Result Cd** window. You want to enter that you **CONTACTED** Mr. Jackson. The final window in the **Action** area is the **Remark** window. Use the **Remark** window to summarize the details of your telephone call.

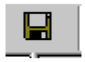


If you start checking the **Save to Outlook** box, you will find that your electronic mandex will be a better tool for managing your time and easier to maintain.

b. Click on the **Action** drop-down arrow. Let's set up a time to telephone Mr. Jackson next week. Click the **Action** scroll bar down arrow and select **TELEPHONE CALL**. You need to become familiar with the other action items listed. The application will default the **Action Date** to today's date; however, you may change this date to



accommodate your schedule. Now you'll need to select a **Time** for the telephone call. Click the ***Tab*** key on your computer keyboard to move from **Action Date** to the **Time** window. When you hit your ***Tab*** key to enter a time, the system automatically inserts the **# Days to Next Action** for you.

c. All that is left is to save your information. Click **File** on the menu bar and click **Save** or you can just click on the **Save** icon. 

d. Does this sound familiar? You are doing the same thing as when you created the record. You need to make sure that you make these appointments and annotate your actions. The next time that you replicate, this information will update the TOS reports and keep your SC updated on the work that you are doing.

e. After completing an entry such as this, you should return to the **Find** screen to check what other actions need to be taken. Do this by clicking **File** on the menu bar. Now, click **Close Record**. This will take you back to the application main screen. If you want to go directly to the **Find** screen, click on **File** and then click on **Open**.